<u>INTRODUCTION</u>

1.   There are 2 methods for obtaining grant approvals:

     •**Administrative Approval –**
     Approved administratively by County Administrator or Agency Head via item placed on Grants Administrative agenda using special profiles in AgendaQuick^{TM} (AQ). *(Legislative/YCBOS action is not required.)*

     •**Legislative Approval by Yuma County Board of Supervisors' (YCBOS) –**
     Approved by the YCBOS via item placed on Regular Session agenda.

2.   All grants are processed for approval via the AgendaQuick^{TM} (AQ), automated agenda software, whether grant is to be approved Administratively by County Administrator, or whether it is to be approved by legislatively by YCBOS action.

3.   Procedures herein presume you have an AQ profile and know how to use the AQ software to create agenda items. If you don't have and need an AQ profile or if you need AQ software training, contact one of the following in the Clerk of Board's office:
     •Christy Isbell, 373-1107, Christy.isbell@yumacountyaz.gov
     •Yoli Duran, 373-1133, Yolanda.duran@yumacountyaz.gov
     •Desarae Doten, 373-1105, Desarae.doten@yumacountyaz.gov

4.   A single AQ "Meeting Date" is established for each fiscal year, and all Administrative Grant submissions for the entire year are placed on that fiscal year agenda.

     Example: For grants applicable to Fiscal Year 2014-15, the AQ Meeting Date is:
     06-30-2015 – Grants Administrative

     This is the AQ Meeting Date to choose when creating an AIR-Form for an <u>administratively</u> approved Grant that applies to Fiscal Year 2014-15.

5.   The Office of Management & Budget (OMB), and Financial Services are available to answer specific grants requirement questions.

I. PRELIMINARY STEPS for ALL GRANTS -- DETERMINE METHOD OF APPROVAL

➢1st thing to do –

Determine* proper Grant approval method – either to be approved [1]Administratively◆ or [2]Legislatively by YCBOS◆ action:

* Determine proper approval method by consulting one or all of the following:

- •Budget Amendment Policy

- • County purchasing policies, such as:
     -Comprehensive Purchasing Policy;
     -Contract Control Policy
     -Grants Management Policy
- • Financial Services:
     -Mary Jo McIntyre, Grants Manager
     -Scott Holt, Financial Services Director

- • Office of Management & Budget (OMB):
     -Jim Flory, Budget Manager
     -Vanessa Valenzuela, Sr. Management Analyst
     -Lucia Gomez, Management Analyst

◆IF Legislative Action by YCBOS is proper approval method, STOP HERE◆
DO NOT PROCEED with creating an ADMINISTRATIVE GRANT AIR-FORM.
Instead, submit a Legislative Grant item for the next available YCBOS Regular Session.
NOTE: Instructions for submitting Legislative Grant items are not included herein.

➢2nd thing to do –

❖If Administrative approval is proper approval method,
Create a Grants Administrative AIR-F. Proceed to Section II below.

II. CREATE AIR-FORM using AQ SOFTWARE for ADMINISTRATIVE GRANT

(Instructions presume you have an AQ Profile and know how to use AQ software.)
(A "picture" procedure showing AQ choices can be provided upon request.)

Log into the AQ software at: http://172.19.0.111/frs, then:

➢ **1ST thing to do** – Choose "Meeting Type": **Grants Administrative**

➢ **2nd thing to do** – Choose "Meeting Date" that applies to the fiscal year to which the grant applies.

> Example: For a Fiscal Year 2014-15 grant, chose the Meeting Date named: **06-30-2015 – Grants Administrative**

➢ **3rd thing to do** – Select appropriate "Agenda Category": *Choose your department***
    ***Example: If you work for Public Works, choose: Public Works

➢ **4th thing to do** – Finish all sections of AIR-Form as per any other AIR-Form, including "Fiscal Impact" (the button).

➢ **5th thing to do** – Under "Documents to Approve" check all box(es) that apply. The options are:

> • Grant Review Form (GRF)
> • Agreement
> • Intergovernmental Agreement (IGA)
> • Other *   *Specify the "Other" under "Other Documents, if any".*

➢ **6th thing to do** – Attach to AIR-Form, all documents checked in "Documents to Approve".

➢ **7th thing to do** – Submit item into routing per normal AQ procedure.

NOTE: A "picture" SOP of the above-listed steps is also provided under separate cover.